

VISITATION REPORT

2004

MONTANA STATE PARKS AND FISHING ACCESS SITES



MONTANA FISH, WILDLIFE & PARKS
PARKS DIVISION
February 2005



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VISITATION REPORT 2004

MONTANA STATE PARKS AND FISHING ACCESS SITES

EXECUTIVE SUMMARY

This report documents visitation information for Montana State Parks and Fishing Access Sites (FAS) for calendar year (CY) 2004, with comparisons made to available data from 1980, 1985, 1995, and 1998 through 2003. Some highlights of this report are summarized below.

State Parks

- Montana State Parks 2004 annual visitation increased to its highest point since 1995 at 1.65 million visitors.
- Two new parks were added to the system late in the year, Brush Lake, the first state park in Region 6 and Tower Rock in Region 4. Though the State Parks System counted 50 parks in 2004, compared to 42 parks last year, visitation estimates include the same parks as in 2003. Visitation was not yet estimated at the new parks due to late entry to the system and lack of survey data. The new count also includes the six Flathead Lake parks as individual units and the Smith River.
- Resident day use fees were eliminated at state parks in 2004. A \$4.00 fee was collected on all light vehicle registrations to replace this funding source. Parks near a large population base tended to see visitation increases from the local constituencies later in the summer.
- Visitation numbers slightly increased in all Regions.
 - Region 1 visitation at these eleven parks rose 24%, from 226,782 in 2003 to 281,566 in 2004.
 - Region 2 visitation rose from 153,848 in 2003 to 173,499 in 2004, an overall increase of 13% at the eleven parks.
 - In Region 3, visitation rose at eight monitored parks from 322,172 in 2003 to 354,341 in 2004, an increase of approximately 10%.
 - Region 4 visitation rose at five monitored parks from 216,814 in 2003 to 227,097 in 2004, or nearly 5%.
 - Visitation at the five Region 5 parks increased by 1% from 356,951 in 2003 to 361,181 in 2004.
 - Region 6 acquired its first park in December, Brush Lake, and will monitor visitation in 2005.
 - Visitation in the six Region 7 parks increased by almost 5%, from 184,721 in 2003 to 193,454.

- Region 5 hosted the largest number of visitors in 2004, with Region 3 hosting only 6,800 fewer visitors. Region 2 hosted the smallest number of visitors.
- For the first time since 1995, Giant Springs was the most highly visited park in the system with 180,024 people. Giant Springs, Cooney Reservoir, and Lake Elmo are the only three parks in the system that reported visitation over 100,000 in 2004.
- Montana's urban and water-based state parks continue to be among the most heavily visited units in the system. These parks include the Flathead Lake parks collectively, Spring Meadow Lake, Tongue River Reservoir, in addition to Giant Springs, Cooney Reservoir, and Lake Elmo.
- Travelers' Rest, Missouri Headwaters and Giant Springs saw visitation increases of 89%, 32% and 23% respectively from 2003 to 2004. The nationwide emphasis on the Lewis and Clark Commemorative is attributed to these increases.

Residency

- The percentage of residents using state parks continues to rise, with 73% of visitors from Montana in 2004. Eliminating day use fees for Montana residents may have influenced this shift.
- As was the case in 1998-2003, Region 5 hosted the highest percentage of resident state park visitors of any region in the state, 87% in 2004. Within that region, 94% of Lake Elmo visitors, 98% of Cooney Reservoir visitors, and 64% of Chief Plenty Coups visitors were residents.
- While all regions hosted less than 40% non-resident visitors, Regions 3 and 7 hosted the largest percentage of non-resident visitors. Region 3 recorded 35% non-resident visitation in 2004, while Region 7 recorded 36% non-residents. In Region 3, the park with the highest non-resident visitation rate was Missouri Headwaters, with a non-resident visitation rate of 63%. Aside from Pirogue Island and Hell Creek, Region 7 parks all hosted relatively large numbers of non-residents in 2004, the highest rate in the region occurring at Rosebud Battlefield at 64%.

Day Use

- Day use visitors continue to comprise a majority of State Park visitors. In 2004, 86% of visitors visited parks for the day, while 14% stayed overnight.
- Regions 3, 4 and 5 hosted the highest percentage of day use visitors, ranging from 91% to 96%.

- Regions 2 and 7 hosted the highest percentage of overnight visitors. Twenty-seven percent of Region 2 total visitors stayed overnight, with Beavertail Hill accommodating 79% and Salmon Lake hosting 62% of their respective visitors overnight. Twenty-nine percent of Region 7 visitors stayed overnight, with 48% and 34% respectively at Tongue River Reservoir and Hell Creek.

Park Categories

- Of the three types of parks compared, water-based park visitors are 85% Montana residents, much lower than the 58% and 57% resident use at cultural and natural parks, respectively.
- Cultural parks are primarily used for day-use, 96%, as compared to 81% and 80% day use at water-based and natural parks.

Fishing Access Sites

- In 2004, FAS visitation was estimated at 3.6 million across the entire state.
- Based on limited data, FAS resident visitation estimates remained steady at 79% in 2004. This data falls within the range of resident FAS visitation for the past 5 years of approximately 70-80%.
- Overnight visitation to fishing access sites is estimated at 2% statewide for 2003.

INTRODUCTION

Accurate visitation information is critical for comprehensive planning and management of recreation sites. Visitation numbers allow managers to assess trends and formulate management policies based on the visitation profile. When compared with revenue trends and other data, accurate visitation data provides a strong base from which to make management and marketing decisions for the statewide parks system and, as a result, better serve Montana State Park and FAS visitors.

The majority of CY 2004 visitation information in this report was derived from vehicle counts generated by traffic counters. An additional 5% was added to each annual system wide total to account for shoulder and off-season visitation, which was not included in many of the counts, and for parks where visitation was not recorded. This additional percentage was dropped from 10% due to improved data collecting and reporting methods in 2003 and 2004 resulting in more thorough estimates across the state.

This marked the second year of reporting data in an internet-based system, rather than an Excel spreadsheet-based reporting system. Past and present recommendations to conduct and fine-tune the system are included in this report to provide continuity in the improvement of this system. The Region 3 summer research also gave more credibility to the accuracy of magnetic loop counters, which are the predominant type used in state parks.

The number of visitor vehicles entering a site for a given period of time was multiplied by a persons-per-vehicle ratio and added to walk-in/bike-in counts to obtain a count of the number of visitors to the site. Regional staff periodically conduct observational surveys at selected sites around the state in an effort to obtain persons-per-vehicle estimates, as well as resident-to-non-resident ratios, and day-use and camping ratios. In cases where counters were not in place or inoperative for a period of time, estimates were made based on indicator site figures, or on historical averages. Park visitation summaries included in this report break out day use and camping visitor percentages as well as resident/non-resident ratios.

This was the first year since the late 1980s when fees were not charged for resident day use at the state parks. The 2003 Legislature approved this change in fees and implementation of a \$4.00 fee when registering light vehicles. Parks saw an increase in visitation at varying degrees influenced by promotion of the "Fee to Free" change, weather, and proximity to a large population base. Day use fees continued to be charged to non-residents and for all camping.

In order to address the areas of further research identified in the 2000-2002 Visitation Report, an intern conducted a Region 3 visitation study in the summer of 2004. The study is summarized in the *Summer 2004 Visitation Analysis* section of this report.

In addition to the visitation data for 2004, this report also includes data from several earlier years for comparison purposes. Most of the visitation data from the 1990s was based on vehicle counters. The information for 1980 and 1985 was from the 1986 annual visitation report, which includes estimates for park and FAS sites for 1980 through 1986. The visitation numbers in that report are derived from a mix of actual traffic count data, and estimates based on Montana Department of Transportation highway traffic counts (a very different method than actual counts). While comparisons are made between 1980s and 1990s data in this report, the interpretations should be regarded cautiously because of the different methods of collection.

STATE PARK VISITATION BY REGION

Calendar Year 2004

Region 1 (Kalispell)

Region 1 State Park visitation rose from 2003 to 2004 from 226,782 to 281,566 visitors. Part of the reason for this increase was unusually low visitation in 2003 due to cold, rainy weather conditions early in the summer and fires late in the summer. In addition, the region saw an increase in visitation due to the new fee rule eliminating resident entrance fees. Whitefish Lake, Lone Pine and Logan particularly saw increases in visitation attributed to the “Fee to Free” rule. Montana residents accounted for 73% of all visits to Region 1 parks in 2004, slightly higher than in 2003. The six Flathead Lake parks accounted for approximately 62% of the region’s total visitation and 60% of the region’s overnight visitors.

Table 1
REGION 1 PARK VISITATION, 2004

PARK	TOTAL VEHICLES	TOTAL VISITS	ESTIMATED % MT RESIDENTS	ESTIMATED % NON-MT RESIDENTS	ESTIMATED % DAY USE	ESTIMATED % OVERNIGHT
Big Arm	11,683	23,797	66%	34%	76%	24%
Finley Point	5,512	12,329	79%	21%	55%	45%
Wayfarers	38,457	88,731	71%	29%	88%	12%
West Shore	10,209	19,211	68%	32%	76%	24%
Wild Horse Island	2,839	12,519	62%	38%	100%	0%
Yellow Bay	8,182	18,366	68%	32%	86%	14%
<i>Flathead Lake Subtotal</i>	76,882	174,953	70%	30%	83%	17%
Lk. M. Ronan	8,519	17,744	87%	13%	78%	22%
Logan	7,817	15,126	79%	21%	64%	36%
Lone Pine	9,535	28,154	86%	14%	100%	0%
Thompson Falls	3,496	6,919	50%	50%	44%	56%
Whitefish Lake	18,446	38,670	75%	25%	82%	18%
Total	124,695	281,566	73%	27%	82%	18%

Regional visitation from 2003 to 2004 increased the most at Wayfarers by 54%, Yellow Bay by 38% and Lone Pine by 35%. Visitation in 2004 rose at all other parks except Thompson Falls, which dropped from 7,866 in 2003 to 6,919 visitors in 2004.

In total, visitation to the Flathead Lake sites increased from 134,962 visitors in 2003 to 174,953 in 2004. Within the Flathead Lake area, Wayfarers State Park remained the most heavily visited site in 2004, and the most heavily visited site in Region 1 overall, attracting 88,731 visitors.

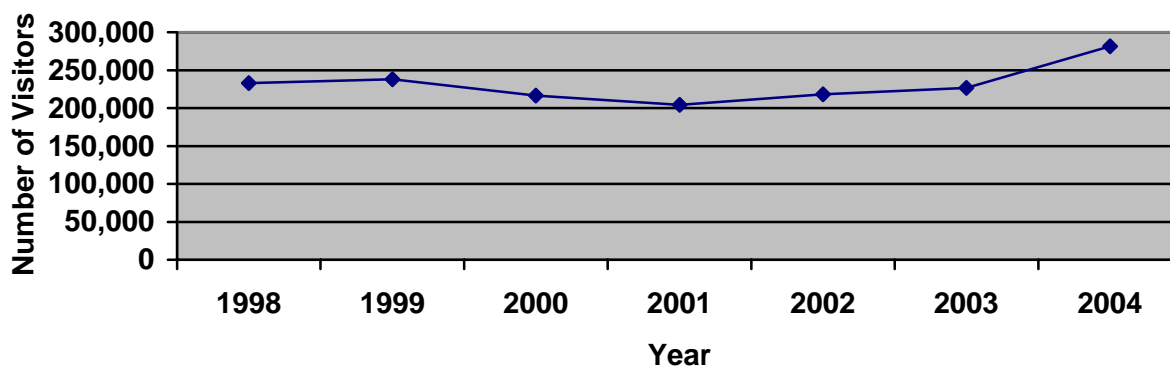
Elsewhere in Region 1, visitation increased by 21% at Logan, 16% at Whitefish, 11% at Big Arm, and 9% at Wild Horse Island between 2003 and 2004. Visitation at Finley Point, Lake Mary Ronan, and West Shore remained relatively constant between 2003 and 2004 with an increase of less than 5%, or several hundred visitors, at each park.

Table 2
1980-2004 VISITATION TRENDS, REGION 1

PARK	1980	1985	1995	1998	1999	2000	2001	2002	2003	2004
Big Arm	23,400*	31,900*	27,183	27,845	24,982	14,562	19,593	18,582	21,462	23,797
Finley Point	26,000*	25,500*	15,830	11,588	9,945	8,429	9,687	15,278	12,070	12,329
Wayfarers	80,900*	75,600*	43,075	66,415	70,393	67,032	52,698	61,471	58,095	88,731
West Shore	21,000*	25,300*	29,154	17,300	14,206	17,832	18,296	17,886	18,446	19,211
Wild Horse Is.	N/A	3,500	N/A	10,258	10,244	7,724	11,932	7,915	11,533	12,519
Yellow Bay	29,900*	28,100	18,940	21,124	24,352	17,629	10,241	15,953	13,356	18,366
<i>Flathead Lake Subtotal</i>	<i>181,200</i>	<i>189,900</i>	<i>134,182</i>	<i>154,530</i>	<i>154,122</i>	<i>133,208</i>	<i>122,447</i>	<i>137,085</i>	<i>134,962</i>	<i>174,953</i>
Lk. M. Ronan	N/A	N/A	22,192	16,017	8,223	19,661	19,960	17,207	17,310	17,744
Logan	47,300*	17,200	21,982	18,111	13,859	18,592	15,267	12,122	12,477	15,126
Lone Pine	14,300*	11,900*	20,937	15,683	16,754	14,089	16,224	18,850	20,798	28,154
Thompson Falls	35,000	13,600	8,236	10,015	11,962	6,694	7,743	9,055	7,866	6,919
Whitefish	66,000	55,300	22,592	18,403	33,013	24,280	22,424	23,644	33,370	38,670
Total	343,800	287,900	230,121	232,759	237,933	216,524	204,065	217,963	226,782	281,566

NOTE: The totals for each year are not necessarily directly comparable. For 1980 and 1985 data, an asterisk indicates the number came from FWP traffic counters, from Memorial Day Weekend until September 30. Other 1980-1985 data were derived from MDT feeder route analysis. Data from 1995-2004 were derived mainly from on-site vehicle counts.

Chart 1. Region 1 Total Visitation Trends 1998-2004



Region 2 (Missoula)

Overall, visitation in Region 2 was higher in 2004 with 173,496 visitors compared to 153,848 visitors in 2003. Much of this increase can be attributed to unusually low visitation in 2003 due to park closures for fire season and construction. In 2003, Beavertail Hill was closed to provide a fire camp and Frenchtown Pond was closed for construction. Predominantly because of these closures, Frenchtown Pond numbers rose from 5,078 in 2003 to 12,623 in 2004 and Beavertail Hill visitation rose from 9,610 in 2003 to 14,475 in 2004.

Visitation at Travelers' Rest increased 89% to 14,093 in 2004 when the park had more staff and continued with a second year of programming efforts in the community and schools. This park is also seeing the influence of Lewis and Clark commemoration interest.

Salmon Lake continued as the most visited park in Region 2 with 32,059 visitors in 2004, though this was a drop of 26% from 2003. The number of visitors at Placid Lake increased from 27,777 to 31,462, or 13%, from 2003 to 2004. Both parks saw an increase in day use activity, particularly at the shower facilities at Placid. Annual visitation numbers do not reflect a large increase in day-use, since visitation was low during the cool, wet weather in early and late summer.

Table 3
REGION 2 PARK VISITATION, 2004

PARK	TOTAL VEHICLES	TOTAL VISITS	ESTIMATED % MT RESIDENTS	ESTIMATED % NON-MT RESIDENTS	ESTIMATED % DAY-USE	ESTIMATED % OVERNIGHT
Anaconda Stack	3,557	8,893	62%	38%	100%	0%
Beavertail Hill	5,790	14,475	17%	83%	21%	79%
Council Grove	9,685	24,213	95%	5%	100%	0%
Fort Owen	4,253	10,633	55%	45%	100%	0%
Frenchtown Pond	5,049	12,623	89%	11%	100%	0%
Granite	184	460	91%	9%	100%	0%
Lost Creek	5,486	13,715	50%	50%	54%	46%
Painted Rocks	4,349	10,873	81%	19%	92%	8%
Placid Lake	11,602	31,462	87%	13%	75%	25%
Salmon Lake	12,141	32,059	81%	19%	38%	62%
Travelers' Rest*	5,944	14,093	53%	47%	100%	0%
Total	68,040	173,496	72%	28%	73%	27%

Note: Data collection ran from January through December at Anaconda Stack, Fort Owen, Granite, and Painted Rocks; nine months each at Council Grove and Traveler's Rest (9 months); visitation counts at Beavertail Hill, Frenchtown Pond, Lost Creek, Placid Lake, Salmon Lake ran from May through November.

Fort Owen rose from 6,040 to 10,633 from 2003 to 2004. Painted Rocks and Anaconda Stack visitation rose 33% and 20% respectively from 2003 to 2004. Lost Creek visitation decreased, from 15,283 in 2003 to 13,715 in 2004. Council Grove visitation remained steady over the last two years. Eliminating resident day use fees did not significantly influence visitation at parks where fees are not charged.

In 2004, 73% of visitors to Region 2 state parks were residents. Council Grove, Frenchtown Pond, Painted Rocks, Placid Lake, and Salmon Lake continue to be visited predominately by Montana residents, between 80% and 90%. Council Grove hosted the highest percentage of Montana residents in the region, at 95%. Anaconda Stack hosted 62% resident visitors. In contrast, 83% of Beavertail Hill visitors were non-residents. Fort Owen, Travelers' Rest and Lost Creek visitation was split about evenly between Montanans and non-residents.

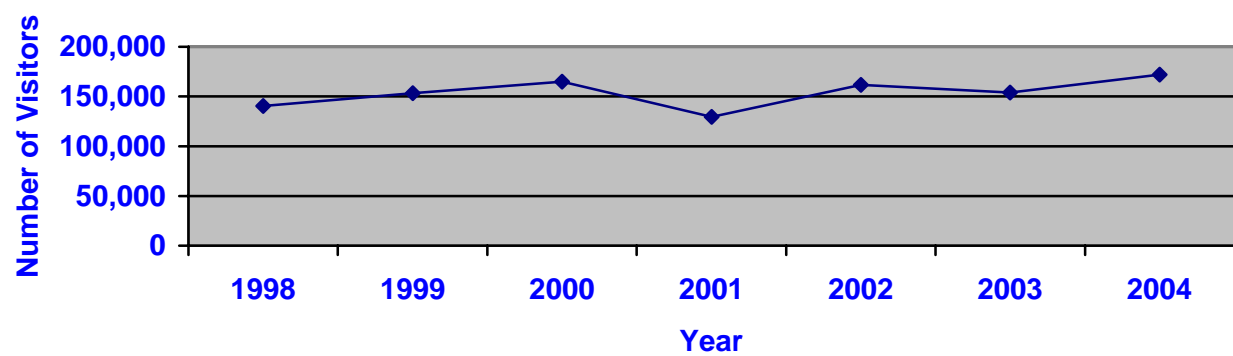
Overall, 27% of Region 2 state park visitors camped during their stay. While six of the eleven parks in Region 2 provide day use only, Beavertail Hill and Salmon Lake hosted more overnight visitors than day use visitors in their relative parks. Beavertail Hill overnight visitation was estimated at 79% in 2004, up from 70% in 2003. Salmon Lake overnight visitation rose slightly from 54% in 2003 to 62% of total visitation in 2004. Overnight visitation at Lost Creek, and Placid Lake remained steady between 2003 and 2004 with 46% and 25%, respectively. Painted Rocks overnight use dropped slightly from 18% in 2003 to 8% in 2004.

Table 4
1980-2004 VISITATION TRENDS, REGION 2

PARK	1980	1985	1995	1998	1999	2000	2001	2002	2003	2004
Anaconda Stack	N/A	N/A	N/A	N/A	N/A	N/A	7,051	6,916	7,428	8,893
Beavertail Hill	9,900	10,200	14,733	15,884	19,426	18,406	15,211	16,147	9,610	14,475
Council Grove	N/A	5,500	12,273	13,297	12,924	20,177	18,332	19,978	23,981	24,213
Fort Owen	4,200	4,100	3,905	3,512	6,978	2,860	8,941	6,646	6,040	10,633
French. Pond	34,100*	45,500	69,106	28,008	21,190	26,403	0	14,678	5,078	11,195
Granite	N/A	N/A	N/A	N/A	N/A	2,523	N/A	N/A	N/A	460
Lost Creek	12,500	10,700	16,885	18,920	16,479	19,002	14,654	18,296	15,283	13,715
Painted Rocks	N/A	N/A	N/A	10,070	10,135	15,961	12,726	15,369	8,165	10,873
Placid Lake	20,900	45,200	27,129	19,004	30,448	20167	13,555	25,126	27,777	31,462
Salmon Lake	25,100	53,400	37,393	31,749	35,653	39,303	39,111	38,618	43,042	32,059
Travelers' Rest	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	7,445	14,093
Total	106,700	174,600	181,424	140,444	153,233	164,802	129,581	161,774	153,848	172,071

NOTE: The totals for each year are not necessarily directly comparable. For 1980 and 1985 data, an asterisk indicates the number came from FWP traffic counters, from Memorial Day Weekend until September 30. Other 1980-1985 data were derived from MDT feeder route analysis. Data from 1995-2004 were derived mainly from on-site vehicle counts.

Chart 2. Region 2 Total Visitation Trends 1998-2004



Region 3 (Bozeman)

Region 3 visitation rose slightly between 2003 and 2004, rising slightly from 322,172 to 354,341. The Missouri Headwaters was the most visited park in the region this year, rising from 69,759 visitors in 2003 to 92,346 visitors in 2004. Spring Meadow Lake, was the second most visited park in the region this year, and saw an increase in visitors from 84,934 in 2003 to 90,822 in 2004. Elkhorn was the least visited park in the region, with 5,518 visitors in 2004. As expected, the region saw some increase in visitation at Spring Meadow Lake as a result of eliminating entrance fees, but perhaps due to slow public recognition of this fee change and inclement early summer weather, other parks in the region did not see a related increase until late in the season.

Visitation at Bannack decreased to 28,232 in 2004, a drop of approximately 2%. Visitation also decreased in 2004 at Black Sandy and Lewis and Clark Caverns, by 3% and 16% respectively. Visitation did increase by 32% at Missouri Headwaters and 113% at Madison Buffalo Jump. These increases are attributed to statewide interest in the Lewis and Clark Bicentennial.

Clark's Lookout began collecting visitor data in August, after site construction was completed to provide access, parking, latrine and trail use. No visitation data was collected at Beaverhead Rock and Parker Homestead due to the lack of parking or amenities at those sites.

Region 3 utilized an intern for the summer to research counter accuracy, resident and people per vehicle ratios at state parks. A summary of this research can be found on page 30.

Table 5
REGION 3 PARK VISITATION, 2004

PARK	TOTAL VEHICLES	TOTAL VISITS	ESTIMATED % MT RESIDENTS	ESTIMATED % NON-MT RESIDENTS	ESTIMATED % DAY USE	ESTIMATED % OVERNIGHT
Bannack	10,373	28,232	57%	43%	91%	9%
Black Sandy	22,962	54,212	94%	6%	88%	12%
Clark's Lookout	640	1,600	75%	25%	100%	0%
Elkhorn	2,205	5,518	74%	26%	100%	0%
Headwaters	36,040	92,346	37%	63%	84%	16%
L&C Caverns	14,953	53,770	48%	52%	85%	15%
Madison Buffalo Jump	10,708	27,841	43%	57%	100%	0%
Spring Meadow Lake	36,634	90,822	95%	5%	100%	0%
Total	134,515	354,341	65%	35%	91%	9%

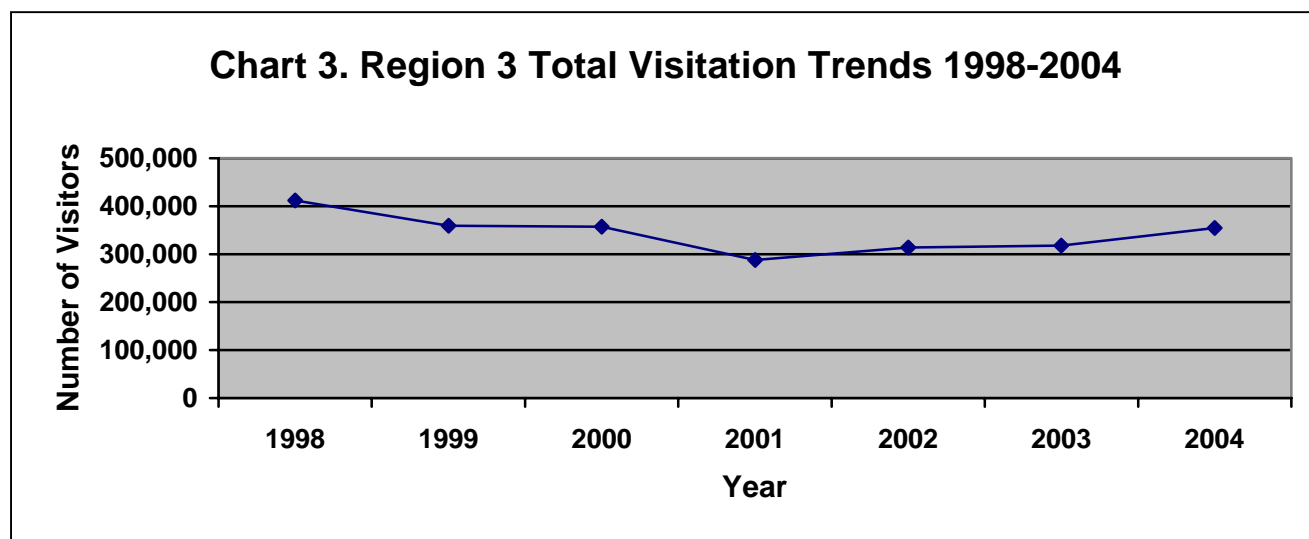
Table 6
1980-2004 VISITATION TRENDS, REGION 3

PARK	1980	1985	1995	1998	1999	2000	2001	2002	2003	2004
Bannack	22,000	19,400*	29,069	33,548	29,911	23,887	25,770	19,289	28,915	28,232
Beaverhead R.	N/A	1,100	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Black Sandy	14,900	69,000	87,745	44,397	48,986	63,892	52,726	51,994	55,880	54,212
Clark's Lookout	N/A	1,100	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1,600
Elkhorn	N/A	2,500	27,144	N/A	5,515	4,218	4,163	6,688	5,863	5,518
Headwaters	20,400	36,800	55,779	75,429	46,603	47,395	32,550	76,022	69,759	92,346
L&C Caverns	56,000	53,000	61,470	68,712	68,867	65,682	58,796	60,334	63,729	53,770
M. Buff. Jump	9,800*	8,900*	15,512	23,020	24,765	23,404	16,523	19,714	13,091	27,841
Parker Homestead	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Sp. Meadow	N/A	35,700*	80,492	166,836	134,577	129,183	97,692	82,327	84,934	90,822
Total	123,100	226,400	357,211	411,942	359,224	357,661	288,220	316,368	322,172	354,341

NOTE: The totals for each year are not necessarily directly comparable. For 1980 and 1985 data, an asterisk indicates the number came from FWP traffic counter data, from Memorial Day Weekend until September 30. Other 1980-1985 data were derived from MDT feeder route analysis. Data from 1995-2003 were mainly derived from on-site vehicle counts. L&C Caverns data for 1980-95 was derived from guided tour numbers, not car counters. Clark's Lookout data was collected from August to December only.

Typical of other urban parks in the system, Spring Meadow Lake attracted the highest percentage of Montana residents in the region in 2004, at 95%, with nearby Black Sandy attracting 94% residents. Elkhorn also hosted a large percentage of residents at 74%. Missouri Headwaters and Madison Buffalo Jump recorded the most out-of-state visitation in the region in 2004 at 63% and 57%, respectively. Overall, 65% of the region's visitors were Montana residents.

As in 2004, Region 3 parks hosted predominantly day use visitors, totaling 91% of all visitation to the region. The highest percent of overnight use in the region occurred at the Missouri Headwaters, with 16% of visitors staying overnight in 2004. In comparison, Lewis and Clark Caverns had 15% of their visitors stay overnight, and Black Sandy dropped from 20% in 2003 to 12% of their total visitors remaining overnight in 2004.



Region 4 (Great Falls)

Overall, Region 4 visitation for 2004 was estimated at 227,097, including Smith River floaters. These numbers constitute a 5% increase in visitation over 2003. For the first time since 1995, Giant Springs was the most highly visited park in the system with 180,024 people, an increase of 23% over 2003. The increase was primarily due to the increased nationwide emphasis on Lewis and Clark related sites. Ulm Pishkun had a slight increase in 2004 to 16,782 visitors. Sluice Boxes declined in visitation this year to 7,267, making it the least visited site in the region; however, data collection methods also changed at this park. Ackley Lake visitation estimates decreased from 25,975 in 2003, to 19,320 in 2004, a decrease of 26%.

Region 4 received a new state park into the system, known as Tower Rock, but no visitation data was collected as the site is not yet signed nor parking available at the site.

Table 7
REGION 4 PARK VISITATION, 2004

PARK	TOTAL VEHICLES	TOTAL VISITS	ESTIMATED % MT RESIDENTS	ESTIMATED % NON-MT RESIDENTS	ESTIMATED % DAY USE	ESTIMATED % OVERNIGHT
Ackley Lake	9,926	19,320	91%	9%	60%	40%
Giant Springs	64,294	180,024	71%	29%	100%	0%
Sluice Boxes	4,040	7,267	94%	6%	94%	6%
Smith River (floaters)	0	3,704	77%	23%	0%	100%
Ulm Pishkun	5,785	16,782	55%	45%	100%	0%
Total	84,045	227,097	72%	28%	95%	5%

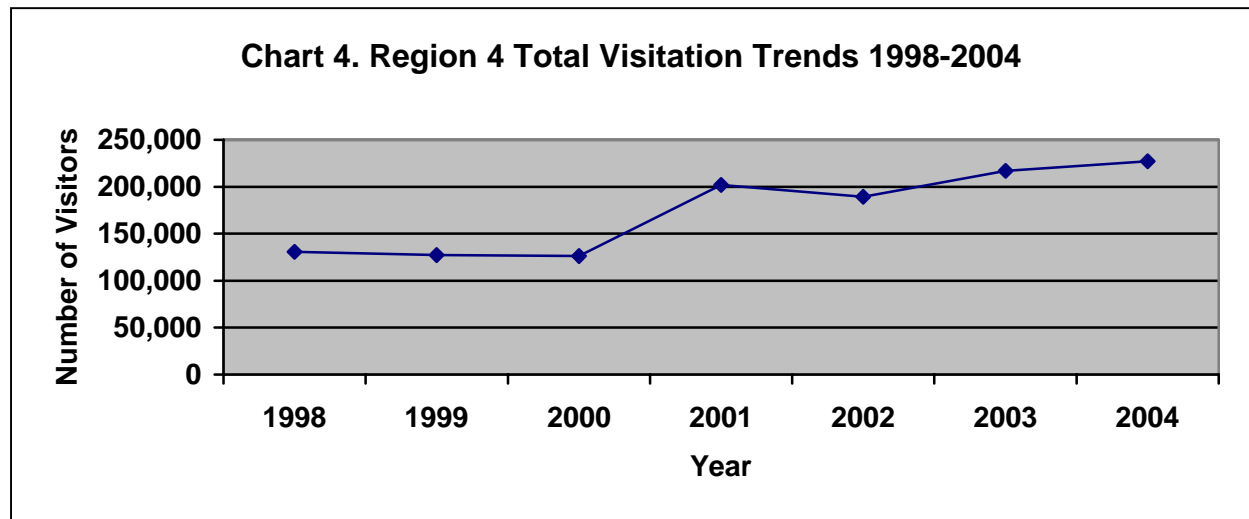
Table 8
1980-2004 VISITATION TRENDS, REGION 4
(Including Smith River)

PARK	1980	1985	1995	1998	1999	2000	2001	2002	2003	2004
Ackley Lake	7,800	11,600	N/A	26,511	26,512	26,512	18,329	18,329	25,975	19,320
Giant Springs	171,000*	168,400*	292,958	99,893	85,980	85,058	150,330	135,317	146,147	180,024
Sluice Boxes	2,200	1,500	N/A	N/A	N/A	N/A	18,329	18,329	25,922	7,267
Smith River (# of floaters)	N/A	854	4,112	4,180	4,120	2,596	2,262	3,539	3,714	3,704
Ulm Pishkun	2,200	5,200	9,317	N/A	10,633	12,170	12,761	13,784	15,056	16,782
Total	183,300	187,554	306,387	130,584	127,245	126,336	202,011	189,298	216,814	227,097

NOTE: The totals for each year are not necessarily directly comparable. For 1980 and 1985 data, an asterisk indicates the number came from FWP traffic counter data, from Memorial Day Weekend until September 30. Other 1980-1985 data was derived from MDT feeder route analysis. Data from 1995-2004 was mainly on-site vehicle counts. Data from 2001-2004 for Giant Springs includes sampling at Lewis and Clark Overlooks and 1999-2004 data at Ulm Pishkun include data from the jump. Data collection methods changed at Sluice Boxes, therefore 2004 data is not directly comparable to previous years.

A majority of Sluice Boxes and Ackley Lake visitors, 94% and 91% respectively, were Montana residents. Giant Springs was estimated to host 71% Montana residents. Ulm Pishkun estimated Montana resident use at 60%.

Region 4 parks are predominately day use facilities. The estimated percent of day users in the region was 95% for 2004. At Ackley Lake, 40% of the visitors stayed overnight in 2004.



Region 5 (Billings)

Region 5 staff reported 361,181 visits in 2004, up only 1% from 356,951 visits in 2003. In 2004, visitation at Cooney reservoir fell 6% from 2003 to 162,856 visitors, though it remained the most highly visited park in the region, and second most visited park in the state. Lake Elmo visitation estimates also dropped by 2% from 2003, to 112,257 in 2004. Weather directly effects visitation at these water based parks; thus, decreased visitation was attributed to the cool, wet spring and early summer in 2004.

Chief Plenty Coups visitation increased from 34,466 in 2003 to 45,552 in 2004. Pictograph Cave visitation also increased in 2004 to 10,364, nearly a 30% increase over 2003. Greycliff Prairie Dog Town hosted the least number of visitors in the region, with 9,240 visitors in 2004.

Region 5 hosted mostly resident day users, as only one park in the region hosts overnight visitors. In 2004, 87% of visitors to the region's parks were Montana residents.

Table 9
REGION 5 PARK VISITATION, 2004

PARK	TOTAL VEHICLES	TOTAL VISITS	ESTIMATED % MT RESIDENTS	ESTIMATED % NON-MT RESIDENTS	ESTIMATED % DAY USE	ESTIMATED % OVERNIGHT
Cooney Res.	49,432	162,856	98%	2%	85%	15%
Lake Elmo	33,392	112,257	94%	6%	100%	0%
Pictograph Cave	10,364	31,276	47%	53%	100%	0%
Plenty Coups	17,518	45,552	64%	36%	100%	0%
Prairie Dog Town	3,833	9,240	39%	61%	100%	0%
Total	114,539	361,181	87%	13%	93%	7%

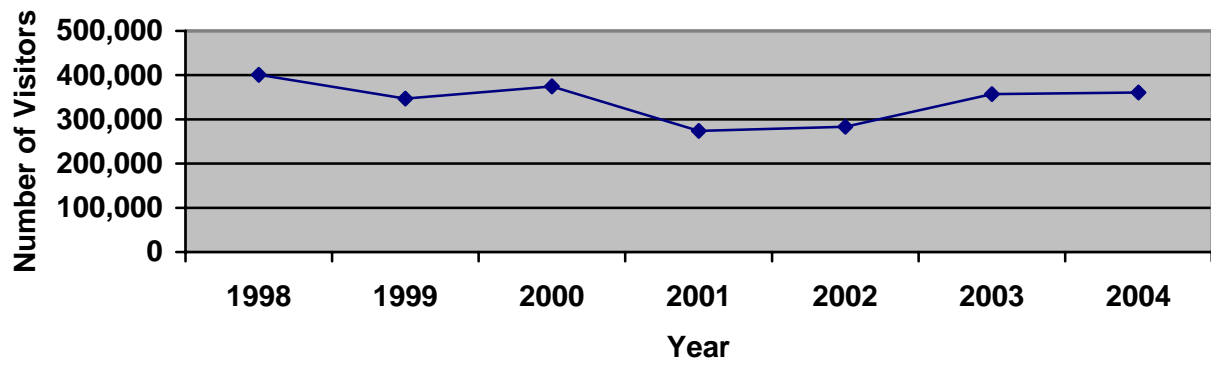
NOTE: Data collection ran from January through December at Cooney Reservoir, Chief Plenty Coups, and Lake Elmo; visitation counts at Pictograph Cave and Prairie Dog Town ran from April through December.

Table 10
1980-2004 VISITATION TRENDS, REGION 5

PARK	1980	1985	1995	1998	1999	2000	2001	2002	2003	2004
Cooney Res.	182,200*	22,900*	128,963	189,757	223,178	195,174	150,361	176,398	173,234	162,856
Lake Elmo	N/A	21,300	54,979	56,692	53,749	98,723	70,056	60,537	114,538	112,257
Picto. Cave	26,700*	N/A	22,408	40,944	13,084	36,164	24,058	24,439	24,208	31,276
Plenty Coups	8,300*	32,700*	23,440	37,793	26,210	23,528	15,544	13,010	34,466	45,552
Prairie Dog T.	N/A	10,400	16,244	18,808	31,184	21,077	13,609	8,723	10,505	9,240
Total	217,700	187,300	246,034	343,994	347,405	374,666	273,628	283,107	356,951	361,181

NOTE: The totals for each year are not necessarily directly comparable. For 1980 and 1985 data, an asterisk indicates the number came from FWP traffic counter data, from Memorial Day Weekend until September 30. Other 1980-1985 data was derived from MDT feeder route analysis. Data from 1995-2004 was mainly on-site vehicle counts.

Chart 5. Region 5 Total Visitation Trends 1998-2004



Region 7 (Miles City)

Estimated visitation in Region 7 parks increased over the past five years. Visitation in 2004 was 193,454, or 5% higher than in 2003 when the region hosted 184,721 visitors. Tongue River Reservoir visitation estimates decreased by 1% from 2003, but the park continued to be the most visited in the region, with 80,815 visitors. Visitation numbers to Makoshika rose by approximately 17% from 2003 to 2004, with 54,891 visitors in 2004. This was likely a result of eliminating day use fees and increased use from the citizens of nearby Glendive. Though reservoir levels have been low for several years, visitation rose at Hell Creek, from 36,611 in 2003 to 38,529 in 2004, probably due to the change in fees for Montana residents. The least visited park in the region was Rosebud Battlefield, which hosted an estimated 3,049 visitors in 2004, a 5% decrease from 2003.

In 2004, Region 7 received 64% resident visitation in 2004. The percent of day use rose from 62% in 2003 to 71% of total visitors in 2004. Campers were 29% of the total regional visitors.

Table 11
REGION 7 PARK VISITATION, 2004

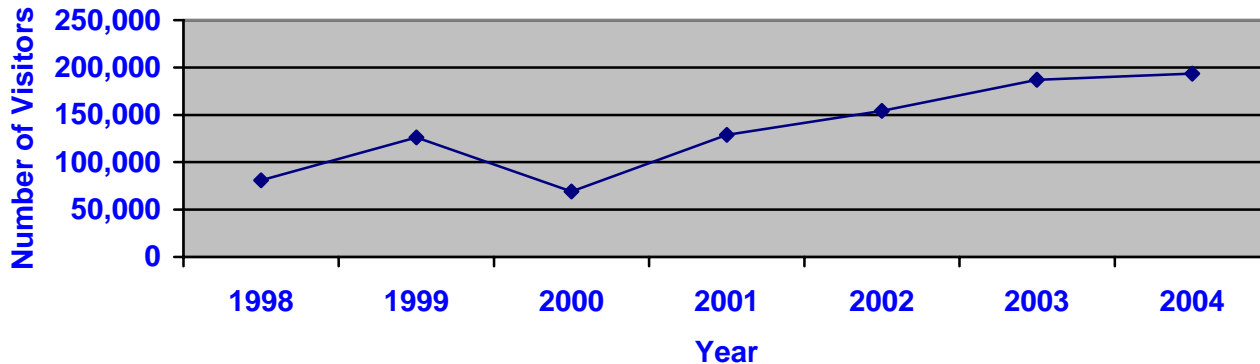
PARK	TOTAL VEHICLES	TOTAL VISITS	ESTIMATED % MT RESIDENTS	ESTIMATED % NON-MT RESIDENTS	ESTIMATED % DAY USE	ESTIMATED % OVERNIGHT
Hell Creek	15,730	38,529	79%	21%	66%	34%
Makoshika	21,856	54,891	48%	52%	97%	3%
Medicine Rocks	3,974	10,356	60%	40%	73%	27%
Pirogue Island	2,414	5,814	87%	13%	100%	0%
Rosebud Battle.	1,329	3,049	36%	64%	100%	0%
Tongue River	26,515	80,815	68%	32%	52%	48%
Total	71,818	193,454	64%	36%	71%	29%

Table 12
1980-2004 VISITATION TRENDS, REGION 7

PARK	1980	1985	1995	1998	1999	2000	2001	2002	2003	2004
Hell Creek	43,300	15,700	9,339	21,306	21,477	22,588	13,088	25,357	36,611	38,529
Makoshika	45,000*	40,400	40,737	52,455	60,364	47,209	40,790	48,490	46,782	54,891
Medicine Rocks	9,300*	12,300*	N/A	7,153	8,268	3,493	5,978	8,698	11,153	10,356
Pirogue Is.	N/A	1,700	N/A	N/A	4,744	4,805	3,197	6,038	5,364	5,814
Rosebud B.	5,300*	3,500	N/A	N/A	2,165	2,182	2,140	2,491	3,206	3,049
Tongue River	N/A	50,900	41,583	N/A	29,060	30,722	63,794	75,501	81,607	80,815
Total	102,900	124,500	91,659	80,914	126,078	68,885	128,987	166,575	184,721	193,454

NOTE: The totals for each year are not necessarily directly comparable. For 1980 and 1985 data, an asterisk indicates the number came from FWP traffic counter data, from Memorial Day Weekend until September 30. Other 1980-1985 data was derived from MDT feeder route analysis. Data from 1995-2004 was mainly on-site vehicle counts.

Chart 6. Region 7 Total Visitation Trends 1998-2004



STATEWIDE PARK VISITATION

Calendar Year (CY) 2004

Montana State Parks added two new parks, Tower Rock and Brush Lake, to the system in 2004. Traffic counters were not yet installed at the new parks; therefore, annual statewide parks visitation numbers in this report continues to include the same state parks as in 2003 (counted as 42 parks, or 48 parks if counting the Flathead Lake parks individually). The 2002 data and several previous years included 41 parks, prior to Travelers Rest entering the system. Aside from a decrease in 2001, visitation to the Montana State Park system remained just under 1.5 million for the past six years. Visitation over the last two years was slightly over 1.6 million, the largest number of people visiting state parks in over 9 years.

Chart 7. Statewide Parks Visitation Trends 1995-2004

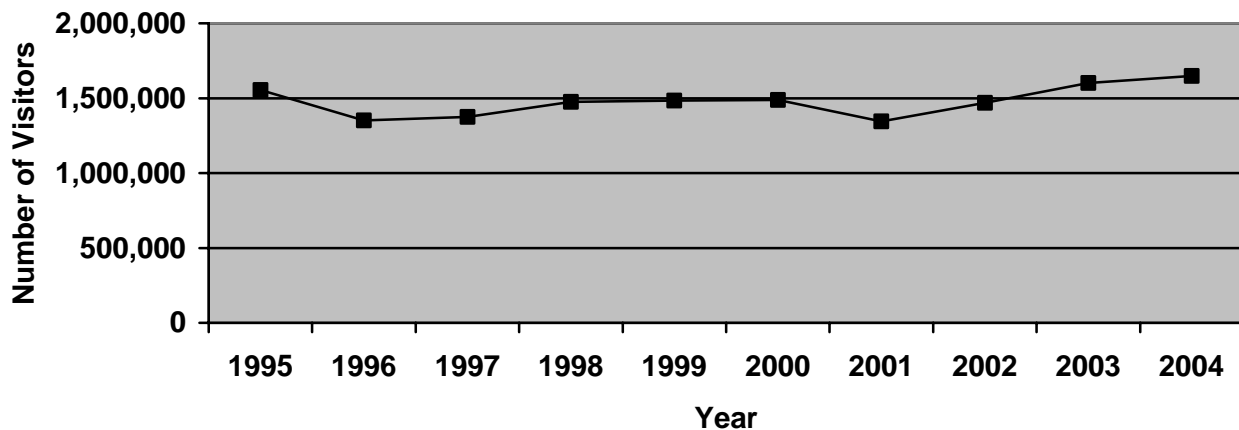


Table 13

ESTIMATED STATEWIDE PARKS VISITATION, 1995-2003

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Parks Totals	1,554,120	1,352,134	1,374,672	1,474,701	1,483,844	1,488,311	1,344,496	1,468,594	1,607,417	1,649,291

Long range, system-wide comparisons are difficult due to the loss of parks in the late 1980s and early 1990s and changes in counting methodology prior to 1995. Visitation counts from 1995-2004 were completed through a relatively consistent methodology. Statewide visitation estimates from 1995-2004 are based on actual vehicle counts at the parks from which counter data were submitted and using historical averages for sites with no current data. Many regions have refined visitation estimation reporting by field staff in recent years. A 10% factor had been added to most system-wide annual counts prior to 2004 to account for shoulder and off-season

visitation; because of the more thorough park visitation estimates, an additional 5% was added to the 2004 annual system wide total.

While the percentage of resident visitors to Montana State Parks greatly increased beginning in the late 1980s or early 1990s, resident visitation has hovered around 70% of total visitation for the last nine years. Resident visitation to Montana State Parks in 2004 rose slightly from 70% to 73% due in part to the elimination of day use fees for Montana residents. Visitation rose particularly at parks near a large population base.

Table 14
TRENDS IN RESIDENT/NON-RESIDENT VISITATION:
MONTANA STATE PARKS, CY 1985-2004

YEAR	% MT RESIDENTS	% NON-MT RESIDENTS
1985	52%	48%
1986	58%	42%
1987	49%	51%
1988	49%	51%
1992	60%	40%
1995	66%	34%
1996	68%	32%
1997	71%	29%
1998	69%	31%
1999	68%	32%
2000	71%	29%
2001	75%	25%
2002	70%	30%
2003	70%	30%
2004	73%	27%

Region 5 hosts the highest number of residents, likely due to the popularity of water-based parks Lake Elmo and Cooney. The highest number of non-residents visit parks in Region 7 due to the popularity of parks near Wyoming and North Dakota, and in Region 3 because of their proximity to Yellowstone National Park.

Table 15
REGIONAL AVERAGE PERCENT
RESIDENT/NON-RESIDENT PARK VISITATION, 2004

REGION	RESIDENT	NON-RESIDENT
Region 1	73%	27%
Region 2	72%	28%
Region 3	65%	35%
Region 4	72%	28%
Region 5	86%	14%
Region 7	64%	36%
Total	73%	27%

Day use visitation predominated in Montana State Parks in 2004, with 86% of overall visitation comprised of day use visitors and the remaining 14% comprised of overnight visitors. These percentages changed somewhat from 2002 when 80% of statewide parks visitation was day use and 20% overnight use.

Table 16
REGIONAL AVERAGE PERCENT PARK DAY USE AND
OVERNIGHT VISITATION, 2004

REGION	DAY USE	OVERNIGHT
Region 1	82%	28%
Region 2	73%	27%
Region 3	91%	9%
Region 4	96%	4%
Region 5	93%	17%
Region 7	71%	29%
Total	86%	14%

PARK COMPARISONS BY CATEGORY

Calendar Year 2004

Montana's state parks vary in emphasis between cultural, water-based, natural and recreational attributes. It can be beneficial to compare park visitation information in relation to facilities, recreational opportunities and local attributes to make management and visitor services decisions. The comparisons provided below are intended to raise questions and spark discussion, recognizing that a variety of amenities and attributes may influence different visitation levels. State parks often span several categories, but for these comparisons, parks are only listed in one table relating to the primary opportunities at that park. For example, people primarily visit Giant Springs' because of its relativity to the historic Lewis and Clark expedition; however, this park also provides angling and general recreational opportunities.

Cultural Parks

Table 17 below lists cultural parks to compare use across the state at sites managed for similar purposes. Sites associated with the Lewis and Clark route saw increases in visitation in 2004 attributed to the start of the bicentennial commemoration of the expedition. Travelers' Rest saw 89% increase over 2003, in part due to its second year of programming and improved trail facilities. Headwaters visitation increased 32% and Giant Springs, with a 23% increase, receives nearly double the visitation that Headwaters receives. Both Headwaters and Giant Springs are near interstate routes. Giant Springs, however, receives 75% resident use compared to Headwaters 37% resident use. Giant Springs is located within the state's third largest city according to the 2000 Census, and provides only day use opportunities, unlike Headwaters, which provides camping opportunities outside the small town of Three Forks.

Ulm Pishkun and Madison Buffalo Jump are sites of similar historical use, yet estimated visitation at Madison Buffalo Jump is about 40% higher. This is interesting given the differences in road conditions and interpretive services offered at the two sites. Some of this discrepancy may be attributed to the different types of car counter used at the two sites and their respective reliability, in combination with the staff available to verify this data.

Chief Plenty Coups, Ulm Pishkun and Makoshika are cultural parks that have visitor centers, yet visitation varies considerably from 16,782 visitors, 45,552 visitors and 54,891 visitors respectively. The high visitation at Makoshika is interesting because it is so far from a large population base. Resident use among these three sites ranges from 48% to 64%. Makoshika has the most acreage of the three and provides several additional recreational opportunities that Plenty Coups and Ulm do not provide, such as: camping, more miles of trails, hunting, amphitheater, and a rifle range.

Table 17
CULTURAL PARK VISITATION, RESIDENT USE AND DAY USE
CY 2004

PARK	TOTAL VISITS	ESTIMATED % MT RESIDENTS	ESTIMATED % DAY USE	REGION
Fort Owen	10,633	55%	100%	2
Travelers' Rest	14,093	53%	100%	2
Ulm Pishkun	16,782	55%	100%	4
Council Grove	24,213	95%	100%	2
Madison Buffalo Jump	27,841	43%	100%	3
Bannack	28,232	57%	91%	3
Pictograph Cave	31,276	47%	100%	5
Plenty Coups	45,552	64%	100%	5
Makoshika	54,891	48%	97%	7
Headwaters	92,346	37%	84%	3
Giant Springs	180,024	71%	100%	4
TOTAL	525,883	58%	96%	

NOTE: This table does not include some of the smaller cultural parks at which data is difficult to attain due to the lack of formal facilities and on-site staff, such as Elkhorn, Granite, Anaconda Stack. Giant Springs and Headwaters data includes multiple entrances.

Water-Based Recreation Parks

Twenty parks are visited primarily for their water-based recreational opportunities: swimming, boating, floating and fishing. Table 18, below, lists these parks in order of estimated total visitors for 2004. As a group, the six parks around Flathead Lake total only 12,097 more than the most visited park in the state, Cooney. The Smith River has the lowest visitation of the water-based parks due to limits placed on the number of launches per day.

Resident use (85%) was much higher at water-based parks when compared to cultural (58%) and natural parks (57%).

Spring Meadow Lake and Lake Elmo are very similar parks when comparing proximity to a large population base and recreational opportunities; visitation at these parks reflect these similarities. Frenchtown Pond has similar facilities and opportunities, but is 15 miles outside of Missoula; visitation was one-tenth of that seen at Lake Elmo in 2004. These parks are primarily used by Montana residents (89% to 95%) and do not offer overnight camping facilities.

Hell Creek in eastern Montana and Whitefish Lake in the West have similar use numbers, though access and proximity to a large population is quite different.

Table 18
WATER-BASED PARK VISITATION, RESIDENT USE AND DAY USE
CY 2004

PARK	TOTAL VISITS	ESTIMATED % MT RESIDENTS	ESTIMATED % DAY USE	REGION
Smith River Floaters	3,704	77%	0%	4
Painted Rocks	10,873	81%	92%	2
Finley Point	12,329	79%	55%	1
Frenchtown Pond	12,623	89%	100%	2
Logan	15,126	79%	64%	1
Lk. M. Ronan	17,744	87%	78%	1
Yellow Bay	18,366	68%	86%	1
West Shore	19,211	68%	76%	1
Ackley Lake	19,320	91%	60%	4
Big Arm	23,797	66%	76%	1
Placid Lake	31,462	87%	75%	2
Salmon Lake	32,059	81%	38%	2
Hell Creek	38,529	79%	66%	7
Whitefish Lake	38,670	75%	82%	1
Black Sandy	54,212	94%	88%	3
Tongue River	80,815	68%	52%	7
Wayfarers	88,731	71%	88%	1
Spring Meadow Lk.	90,822	95%	100%	3
Lake Elmo	112,257	94%	100%	5
Cooney Res.	162,856	98%	85%	5
TOTALS	883,506	85%	81%	

Table 19, below, summarizes water-based recreation visitation by region. Though Region 1 contains the most parks with opportunities to get wet, Region 5 in south central Montana hosts more visitors with only two parks in this category, Lake Elmo and Cooney. Region 4 hosts the fewest visitors with only Ackley Lake and the Smith River in the water-based category.

Table 19
WATER-BASED PARK VISITATION COMPARISONS BY REGION
CY 2004

Region	Number Water-Based Parks	Number Visitors	% of Statewide Water-Based Visitation
4	2	23,024	3%
2	4	87,017	10%
7	2	119,344	14%
3	2	145,034	16%
1	8	233,974	26%
5	2	275,113	31%
TOTALS	20	883,506	100%

Natural Parks

Nine parks are managed for their natural beauty and general outdoor recreational opportunities. All but three of these parks offer overnight camping facilities. As a whole, 57% of visitors to natural parks were not residents of Montana. Lewis and Clark Caverns had the highest visitation of this group; the park also has the highest development and staffing, including guided cave tours, campgrounds, cabins for rent, and a large group use shelter.

Most parks visited for their natural attributes have low visitation, when compared to parks known for their cultural or water-based attributes. Lewis and Clark Caverns was the exception with over 53,770 visitors; Lone Pine was the second most heavily used park in this category with 28,154 visitors.

Table 20
NATURAL PARK VISITATION, RESIDENT USE AND DAY USE
CY 2004

PARK	TOTAL VISITS	ESTIMATED % MT RESIDENTS	ESTIMATED % DAY USE	REGION
Pirogue Island	5,814	87%	100%	7
Thompson Falls	6,919	50%	44%	1
Sluice Boxes	7,267	94%	94%	4
Prairie Dog Town	9,240	39%	100%	5
Medicine Rocks	10,356	60%	73%	7
Wild Horse Island	12,519	62%	100%	1
Lost Creek	13,715	50%	54%	2
Beavertail Hill	14,475	17%	21%	2
Lone Pine	28,154	86%	100%	1
L&C Caverns	53,770	48%	85%	3
TOTAL	162,229	57%	80%	

MONTANA FISHING ACCESS SITES (FAS) VISITATION 2004

Procedures for collecting FAS visitation data are generally similar to state parks car counter collection methods. However, while there are only 50 state parks monitored in the Montana State Parks system, there are approximately 320 fishing access sites statewide. Due to the number of sites, their wide dispersion across the state, and financial and staffing resource constraints in the system, it is not currently feasible to maintain counters at each site. In order to arrive at an estimate for FAS visitation, each region relies on indicator sites to extrapolate to region-wide estimates. Several regions utilize indicators for each drainage and then extrapolate to all other sites in the drainages based on those indicators. Other regions utilize indicators and extrapolate to similar sites for the regional estimate but do not base the indicators on drainages.

While the estimates derived through the indicator methods are not as accurate as actual counts in each site, they do provide a general estimate of visitation in each region. Some data are available for specific regions for 2000 and 2001, while statewide totals for FAS visitation in each region are only available for 2002 through 2004. Total visitation to FAS sites in 2004 remained relatively similar to 2003; approximately 79% of visitors were Montana residents and 98% were day users.

**Table 21
REGIONAL FAS VISITATION, 2003-2004**

REGION	2004
Region 1	431,489
Region 2	825,532
Region 3	1,031,517
Region 4	327,036
Region 5	627,632
Region 6	62,273
Region 7	330,572
Total	3,636,052

**Table 22
REGIONAL FAS RESIDENT/NON-RESIDENT VISITATION, 2004**

	% RESIDENT	% NON-RESIDENT
Region 1	88%	12%
Region 2	81%	19%
Region 3	74%	26%
Region 4	81%	19%
Region 5	79%	29%
Region 6	91%	9%
Region 7	87%	13%
Total	79%	21%

All regions hosted more resident than non-resident FAS visitors. Region 6 hosted the largest percentage, 91%, of resident visitors. Region 5 hosted 29%, the largest percentage, of non-resident visitors.

Across the system, the percentage of overnight visitors at fishing access sites is low, only 2% statewide for 2004. This is partly due to the fact that only about 30% of fishing access sites currently provide the option to camp. In 2004, Region 4 hosted the highest percent of overnight FAS visitors while Region 1 and 3 FAS visitation was comprised of only 1% overnight visitation. These disparities are partly due to a smaller percentage of fishing access sites with formal camping in some regions than others.

Table 23
REGIONAL FAS DAY USE/OVERNIGHT VISITATION, 2004

	% DAY USE	% OVERNIGHT
Region 1	99%	1%
Region 2	97%	3%
Region 3	99%	1%
Region 4	86%	14%
Region 5	94%	6%
Region 6	93%	7%
Region 7	98%	2%
Total	98%	2%

CONCLUSION

Annual State Park and FAS visitation estimates since 1988 vary, not only because of changes in actual visitation counts, but also because of changing counting methods and changes in the size and composition of the parks system. Annual estimates for 1988-2004 are recorded in Table 24. Overall, combined Parks and FAS visitation remained relatively steady in the past eight years, from 5.1 million in 1996 to 5.2 million in 2004. The system experienced significant increases in 1999 and 2000, where visitation increased to 7.3 and 6.2 million, respectively; though parks visitation declined during this period, FAS use increased.

Table 24
PARKS AND FAS VISITATION ESTIMATES, 1988-2004

YEAR	PARK VISITATION	FAS VISITATION	COMBINED FAS/PARK VISITATION
1988	1.4 million	1.7 million	3.1 million
1989	1.2 million	1.4 million	2.6 million
1991	1.3 million	1.6 million	2.9 million
1992	2.1 million	2.4 million	4.5 million
1995	1.6 million	N/A	N/A
1996	1.4 million	3.7 million	5.1 million
1997	1.5 million	3.9 million	5.4 million
1998	1.6 million	3.4 million	5.0 million
1999	1.5 million	5.8 million	7.3 million
2000	1.4 million	4.8 million	6.2 million
2001	1.3 million	4.4 million	5.7 million
2002	1.5 million	3.6 million	5.1 million
2003	1.6 million	3.7 million	5.3 million
2004	1.6 million	3.6 million	5.2 million

NOTE: The State Park data listed for 1992 and earlier, represented a much larger system than at present, including Canyon Ferry, which was then the most heavily visited unit in the system.

SUMMER 2004 VISITATION ANALYSIS

In 2003, a survey was conducted to evaluate the state's current methods of visitation data collection and create a plan for future statewide consistency. The report *Montana State Parks Visitation Data Collection – Review, Analysis, and Recommendations – For a Statewide Approach to Consistency and Accuracy* recommended surveys for field use in estimating visitation. In implementing the recommendations of the 2003 report, Montana State Parks hired a summer intern for 2004 to conduct visitation surveys at state parks in Region 3.

The objectives of this intern were to achieve region-wide consistency, which would begin the process of acquiring consistent data statewide. The intern also reported accurate visitation data for six parks in Region 3 to be used by those managers when calculating summer visitation totals each month and would be applicable for the next five to six years.

One significant finding of this study was the importance of accurate car counters. A comparison of three types of car counters was performed at Missouri Headwaters. The Magnetic loop counter was significantly more accurate than the Cuesta Infrared counter; and though the Sprite tube counter error factor was 50%, this was a consistent error and could be used to correct for the error. Maintaining working counters and replacing those that do not work properly are also critical to obtaining accurate data.

In general, data obtained during the survey was similar to 2003 data for persons per vehicle (0.2% variation) and with one exception, the percentage of Montana resident visitors was generally similar (less than 8% variation). Walk/Bike-In numbers varied significantly for most parks.

Several recommendations came from this summer survey, including the continued use by many parks to use fee envelopes or log books in campgrounds to calculate the percentage of visitors camping rather than surveying for limited sampling periods. Residency is overestimated if surveys only observe license plates rather than interview visitors, since out-of-state visitors travel in rented Montana licensed vehicles or may travel with Montana residents.

The 2004 final report from the intern Anna Green entitled *2004 State Parks and FAS Visitation Study Region 3* and the 2003 final report from the intern Kelly Stickney entitled *Montana State Parks Visitation Data Collection: Review, Analysis, and Recommendations For A Statewide Approach to Consistency and Accuracy* are available at Helena headquarters and at all FWP regional headquarters.

Observational survey forms are included in a Manager's Visitation Data Toolkit included in the 2003 *Montana State Parks Visitation Data Collection* report. The toolkit outlines methods for consistent data collection, which begin in 2004 and will continue to be used in 2005. A Helena-based intern will be used again to collect observational data yearly on a region-by-region rotational basis. Region 4 parks will be surveyed in 2005.

VISITATION REPORTING PROCEDURES

In response to frustrations in the field with the Excel spreadsheet, which was historically used to report visitation data from the regions to Helena, a new visitation reporting method was implemented for the 2003 season and will continue to be used in 2005. The new reporting system is a web-based system located on the FWP Internal website at the following web address:

<https://secure.fwp.state.mt.us/ParksVisit>

At the site, field staff can enter visitation information for all state parks and fishing access sites. Once entered, the data enters an Access database from which reports can be generated. Currently, field staff enters data the first week of the month and reports are generated on the 15th of every month. The system has been fine-tuned over the past year as staff provided recommendations for improving the website and the database. Additional changes may be made in 2005 to make data processing as efficient as possible for field staff.

Critique and Recommendations for 2005

Due to a change in Helena staff and a position vacancy for four months, several recommendations from 2004 will carry over into 2005 to improve the data collection system.

- Develop a method for website viewers to compare visitation between years.
- If possible, develop a system where reports update automatically when new data is entered into the system.
- Formatting issues, including:
 - Check box for FAS remains checked from month to month.
 - All data for each site remains on one page.
 - Observational data remains constant from month to month unless changed by on-site survey verification.

VISITATION DATA RECOMMENDATIONS AND UPDATES

A comprehensive review of visitation data collection was completed in 2001. This process, which involved a FWP visitation committee, produced a useful overview of visitation collection. The review recognized positive elements of the data collection system, recorded significant limitations in the visitation data collected, and identified areas where improvements are needed. The results of this review are outlined in *Visitation Data Limitations and Suggestions for the Future (1/25/2001)*, which is summarized in the first column of Table 25. The second column of the table serves as an update to the 2001 review and provides further suggestions where appropriate, some of which are ongoing with the newly implemented process; 2003 responses are in italics, 2004 responses in normal text.

Table 25
VISITATION DATA RECOMMENDATIONS AND UPDATES

2001 Limits and Recommendations	2003 & 2004 Update and Comments
SUCCESES	
Visitation data collection has become institutionalized, especially for state parks. The quality of effort varies from region to region, but it is now regarded as a routine, on-going responsibility. Generally, our staff members take the effort seriously and try to do a good job.	<i>This is still the case and has resulted in more accurate counting in many regions. With the summer intern studies, improvements continue.</i>
Statewide, the numbers reported for the park system have ranged consistently between 1.4 and 1.6 million in recent years. While the numbers don't reflect the growth we might expect, at least they are not fluctuating wildly (e.g., 4 million on year, 1.5 million the next).	<i>Remains true.</i>
I have been encouraging the regions to begin reporting FAS on a drainage basis (using indicator sites in each drainage), similar to what R-3 has been doing for a number of years. There has been some movement in this direction. Generally, there has been modest improvement in FAS data collection and reporting.	<i>2002 marked the first year when all FWP regions reported region-wide FAS estimates. While the means of estimation still need to be refined, this is a positive step toward a more accurate indication of FAS visitation trends.</i> Coordinating logistics within regions may go a long way toward improving reporting efficiency.
LIMITATIONS	
Visitation data is not available for all sites for comparable years. The data for the FAS system is especially incomplete, particularly given that there are more than 300 sites in the state.	<i>As the comment in the previous row indicates, counting for the FAS system is improving. Improvements need to continue and are discussed later in this table.</i>
Visitor count methods sometimes varied widely from region to region, site-to-site, and year-to-year.	<i>Counting methodology and reporting need to be as consistent as possible across the system. The summer 2003 intern study promises improvements to this issue, as did the 2004 intern in Region 3 parks.</i>

2001 Limits and Recommendations	2003 Update and Comments
The reliability of the observational surveys depends on the sample size and distribution of the sample periods. These often varied widely from site to site.	<i>Observational surveys to gather data, including person per vehicle ratios, will be updated with the system established by the 2003 intern study. The 2004 intern provided reliable data for parks in Region 3.</i>
From the late 1980s through the early 1990s, park and FAS visitation estimates were based on very limited traffic counter data, due to insufficient counters and staffing. Even when traffic counters are in place, they sometimes break down, produce unreliable results, or are not read at proper intervals.	<i>This problem remains. Part of this problem can be remedied through regions requesting additional counters from Parks Headquarters in Helena for the 2004 season. The 2003 intern study served to inventory the condition of all traffic counters. The 2004 intern study found that magnetic loop counters are the most reliable. Requests for counters to replace unreliable or non-working counters need to be made to Helena early in the year.</i>
Short-term visitation changes at particular sites are often the result of external influences such as construction, water levels and weather. For a better understanding of long-term trends, consistent data collection over a period of many years is needed to reduce possibilities that anomalous periods will present an inaccurate picture.	<i>The 2003 intern study established a means by which consistent data can be gathered over time to better understand long term trends.</i>
At sites where the same parties come and go frequently, counts can be artificially inflated. Visitation numbers are derived from clicks on a counter, which cannot distinguish how many times the same group of people has entered a site. Conversely, administrative traffic is not always accounted for and deducted from the totals.	<i>The 2003 intern study established a consistent strategy for counting administrative traffic throughout the system.</i>
Some sites are inherently difficult to monitor, particularly those that have multiple entrances and/or a substantial amount of walk or bike-in visitors.	<i>The 2003 intern study established a strategy for counting multiple entrances across the system. This strategy needs to be tested and refined.</i>
Demands on regional staff time have made it difficult to establish a process that has consistency and reliability not only statewide, but also within the same region. Staff find it difficult to find the time to reach remote sites to read the counters. Conversely, volunteers, interns and seasonal employees play an integral role in the collection process, but visitation data is often only one of many duties, and they may not fully understand collection procedures after being inundated with new information every spring.	<i>The recommendation for a roving intern in the 2003 intern study provides a means to reduce pressure on field staff on this issue.</i>
Regional staff are having problems finding a consistent, reliable way of breaking out campers from day users. Some staff use logs, some use remittance forms, while others rely on tallying fee envelopes.	<i>The 2003 intern study established observational surveys to update these ratios consistently throughout the system. The 2004 Region 3 intern determined that using fee envelopes to determine overnight use was a more accurate estimate than surveying use.</i>

2001 Limits and Recommendations	2003 & 2004 Update and Comments
Staff are not reporting results consistently; there is a format, but it is not always followed. In some cases, data is supplied for different sites by different staff members in the same region, rather than being organized and submitted under one cover. Additionally, totals generated by the electronic spreadsheets are not always checked over before being sent to Helena, and some of them are obviously in error. Conversely, the spreadsheet supplied by Helena has had a number of glitches in it.	<i>This issue has been resolved to a degree. Each region submits one parks and one FAS report. An electronic form of visitation data has replaced the spreadsheet. Currently, parks report visitation data through the FWP Internal Website.</i>
In the park system, there are still a number of sites without counters, some of which could benefit from them. Other sites may not be good candidates for counters due to their layout or remoteness, but regions are failing to provide any kind of estimate.	<i>Several parks have requested and received additional counters. Others still need to request them. Requests for counters should be made to Helena early in the year.</i>
Because of its size, the FAS system will never have counters at every site. However, setting up indicator sites on a drainage basis and using these to make system-wide estimates is one way of addressing this challenge. To date, only three regions are providing Helena with system-wide FAS estimates; in some cases the others are providing data on just a handful of sites which do not illustrate what is happening system-wide.	<i>In 2002-2003 all regions reported FAS system data, although not all region-wide estimates were based on drainage. Also, drainage-based systems may not be appropriate for every region. In 2004, all but two regions provided FAS estimates region-wide.</i>
Some regions are mixing parks and FAS data in their totals, when in fact these are separate systems that should be tallied separately.	<i>No longer a concern.</i>
Some regions are only collecting data for part of the year, leaving portions of the season uncouned.	<i>Needs further research. The summer 2003 intern study outlines procedures for addressing this issue. Needs further research to estimate data during shoulder seasons.</i>
The priority given to visitation data collection varies from region to region. In some cases, collection is not done consistently throughout the year, or from site to site; it is a scramble at the deadline to piece together estimates not well grounded in actual field data.	<i>Still an issue in some areas, but improvements continue.</i>
Helena has not always provided clear enough direction, or made sure that all the people who need the information (e.g., POSs) get it directly, rather than having to wait for it from their supervisors. More timely reminders would also help.	<i>An informational sheet on visitation collection procedures was prepared for the spring training of site staff. This will occur annually.</i>
Some regions continue to have trouble submitting fiscal year data, in particular; it's kind of an afterthought to calendar year data, even though it should be part of the same, seamless data stream.	<i>Because FY data can be calculated from CY data, regions are now asked only to submit CY data.</i>
In some cases, indicator sites have been changed in the middle of the season, making it difficult to obtain complete annual totals.	<i>Needs more research and should be discouraged.</i>

SUGGESTIONS	
2001 Limits and Recommendations	2003 & 2004 Update and Comments
It has been at least 5 years since the old Data Collection Committee met. This group should be formed to address the highest priority issues listed above. We need regional perspectives to help solve these problems. As part of this effort, it might also be worth spending some time researching what other state park systems are doing.	<i>The 2003 intern study provides research on a number of different park systems and analyzes the results of that research for application to the Montana system.</i>
We should think about enlisting the help of our support staff to do the number crunching. If they could supply the numbers in table format, I would be in a position to get the analysis and annual reports done earlier, and spend more time on de-bugging the current process.	<i>This is currently not an issue.</i>
It might be worth investing the time pulling together all our visitation data collection procedures in booklet format.	<i>The Manager's Toolkit developed during the 2003 intern study may be adapted for this purpose.</i>
We should think about our data collection/trends analysis efforts more holistically. Perhaps we should think of an annual report that pulls together <i>all</i> the information we collect (or should be collecting), including passport sales, violations, merchandise sales, budgets, etc.	<i>Visitation and revenue data were compared for 2002. Until visitation numbers are more accurate, conclusions based on comparing such data will be erroneous. Further efforts towards completing such comparisons accurately will be useful for the Division.</i>
ADDITIONAL ISSUES	
2002 Limits and Recommendations	2003 & 2004 Update and Comments
Through observational data, a Summer 2000 Visitation Survey in Region 1 found that traffic counters are not counting correctly. Vehicle weight seems to affect how the counter counts the visit, by over counting for heavy vehicles or not counting lighter vehicles at all. Also, photo counters are observed to be unreliable.	<i>This needs further research in order to adjust for these inaccuracies and, in the long-term, replace counters with more accurate methods if they become available. The 2003 intern study provided a means of conducting such research through the surveys developed.</i>
Resident/non-resident ratios, which are based on license plate observations, may be inaccurate as many non-residents visit the parks in rented vehicles.	<i>This issue may be resolved through thorough visitor surveys at the parks to update ratio estimates. The 2003 intern study provided a means of conducting such research. The 2004 intern study in Region 3 confirmed that surveys are needed to obtain reliable resident data.</i>
Historically, 10% has been added to overall parks visitation counts to account for times when actual counts are not included, such as shoulder seasons.	<i>This practice needs to be examined to determine if it is a reasonable and accurate estimate to continue instituting. The Manager's Toolkit in the 2003 intern study provides a means by which shoulder seasons can be reasonably counted to provide more accurate data. This was dropped to 5% in 2004 since all but one region estimated use for the entire year at nearly all parks.</i>

2002 Limits and Recommendations	2003 & 2004 Update and Comments
Some regions and sites are using formulas to estimate visitation based on previous year's data. While this may result in a ballpark estimate of visitation for that year, the problem compounds itself as years progress and makes trend analysis impossible.	<i>Helena requests actual counts of visitation. When this is not possible, Helena staff should be consulted before the season begins to develop a means of gathering reliable data. The surveys developed through the 2003 intern will remedy this problem once they are instituted.</i>

RECOMMENDATIONS FOR 2005

State Parks

A modest investment in the State Parks visitation system again for 2005, through establishment of a roving visitation intern program, can provide more accurate visitation numbers and, with that improvement, the opportunity to use visitation numbers more effectively and extensively. While visitation data collection for State Parks is now institutionalized, it is still a fairly disorganized and laborious process, especially for regional staff who are charged with collecting and reporting the data within limited budgets. Overall, the visitation intern program provides a more systematic means of collecting and reporting data across the state. For 2005, the following data collection duties should be implemented for State Parks. These duties will be shared between the regions and Helena and will require cooperation to develop reasonable and effective strategies for all staff involved with visitation data collection.

- Request new counters from Helena as soon as possible for new sites in need of counters or sites in need of counter replacement. Counter maintenance is important. If a counter is not fixable it should be replaced as soon as possible.
- Report visitation data at the end of every month to the FWP internal website. Monthly reports will be posted on the Internal Website on the 15th of every month. Year-end tallies need to be reported with an estimate for the year reported by December 1, or by the date requested for the national database, whichever comes first.
- Record park visitation data for every month. Though a park gate is closed, shoulder seasons often have months of mild weather and walk-in use is likely.
- Avoid basing visitation data on previous years whenever possible. If traffic count data collection is impractical for a site, consult with Helena to develop a reasonable counting alternative.
- Begin a system-wide update of visitor surveys to estimate persons per vehicle, resident/non-resident, and overnight/day use ratios, preferably for the entire year rather than only the summer months.

Refer to the FWP *Montana State Parks Visitation Data Collection Review, Analysis, and Recommendations*, Summer 2003 and the Managers' Visitation Data Toolkit within that review for more information on collecting data, or call the Parks Planner at 444-3764.

Fishing Access Sites

2002 marked the first year when FAS data estimates were submitted in entirety for each Parks region and 2003 and 2004 continued with that trend in most regions. These numbers are only estimates that are based on relatively few indicator sites, this reporting is a positive step toward gaining an understanding of FAS visitation. The main problem with FAS counting lies in the fact that the system is large, with approximately 320 sites, and widely dispersed. This fact, coupled with limited staffing budgets, makes an accurate count of all sites completely impractical. Data collection is currently based on a small number of indicator sites in each region from which counts are extrapolated to estimate visitation for the entire system. While the resources are not available to install or check traffic counters at each FAS, a formal system of roving traffic counters that would provide data at each site at least once every few years is an option that needs to be explored with field staff. Another option is to calculate visitation based on drainage as is currently done in Region 3. While this option may work for regions where FASs are primarily located along rivers, it may not be feasible for other regions, like Region 1 and Region 4. Nonetheless, this is another option that should be explored in the coming year and, if adopted for the entire system, should be formalized for consistency throughout the state. The following visitation methodologies should be adhered to in 2005 for FASs, as they were in 2004:

- Request new counters from Helena as soon as possible for new sites in need of counters or sites in need of counter replacement. Counter maintenance is important. If a counter is not fixable it should be replaced as soon as possible.
- Check counter operations (batteries) and report visitation data at the end of every month.
- Record visitation counts and ratios at indicator sites each month throughout the year.
- Establish consistent methods and personnel within the regions for collecting and recording data.
- Selected indicator sites should remain consistent during the year.
- Extrapolate estimates at uncounted sites monthly using counts from similar indicator sites to estimate numbers.
- Work with Fisheries Division and PPL Montana when possible to coordinate data collection efforts.